Wildcat 7.3.02

Card Accounts User Guide

maxgaming

Last update 13.01.10

Table of Contents

1 Wildcat Membership and Player Loyalty 3
1.1 Wildcat Help Desk 3
1.2 Bytecraft Help Desk 3

2 Basic User Tips 4
2.1 Wizards 4
2.1.1 Run Wizard Again on Finishing 4

3 Opening Wildcat 5

4 Accessing Card Accounts 6
4.1 Patron Status 6
4.2 Patron Maintenance Screen 7
4.2.1 Comments Field 7
4.3 Setting up a Card Swipe or Card Printer 7
4.3.1 Installing a Card Swipe 8
4.3.2 Installing a Card Printer (Embosser) 9
4.3.3 Troubleshooting a Card Embosser 9

5 Membership 11
5.1 Finding an Existing Member 11
5.1.1 Clear Search Screen Option 11
5.2 Adding a New Member 11
5.3 Editing Existing Patron Details 12
5.4 Cancelling a Patron 13
5.5 Suspending a Patron 13
5.6 Activating a Patron 13
5.7 Membership Receipting 14

6 Maintaining Patron Cards 15
6.1 Creating a New Card (Card Printers) 15
6.2 Creating a New Card Using the Card Swipe (Pre-Encoded Cards) 16
6.3 Creating a New Card (Requesting a Card Print) 17
6.4 Creating a New Card (Batch Print) 18
6.5 Suspending a Card 20
6.6 Activating a Suspended Card 21
6.7 Cancelling a Card 21

7 Patron Preferences 22
7.1 Selecting Patron Preferences 22

8 Points 23
8.1 Points Transactions 23
8.2 Redeeming Points 23
8.3 Adjusting Points 25
8.4 Transferring Points 25

1 Wildcat Membership and Player Loyalty

The Wildcat Membership and Player Loyalty software is also known as Card Services. In the Card Services System there are two separate areas that will be used regularly by the gaming venue; Manager Utilties and Card Accounts. The Manager Utilities module is used for setting up the default information used by the Card Accounts module. The Card Accounts module is used for the creation and maintenance of Patron records (also known as the Membership Database).

The Card services system (CSS) can be used in conjunction with Gemini Loyalty Units (card readers) or alone as a Membership Database.

1.1 Wildcat Help Desk

For any questions regarding your monitoring system, please do not hesitate to call:

THE MAXGAMING WILDCAT HELP DESK

1800 700 116

Help Desk Hours
Sunday – Friday
7am-midnight
Saturday
7am-1am

1.2 Bytecraft Help Desk

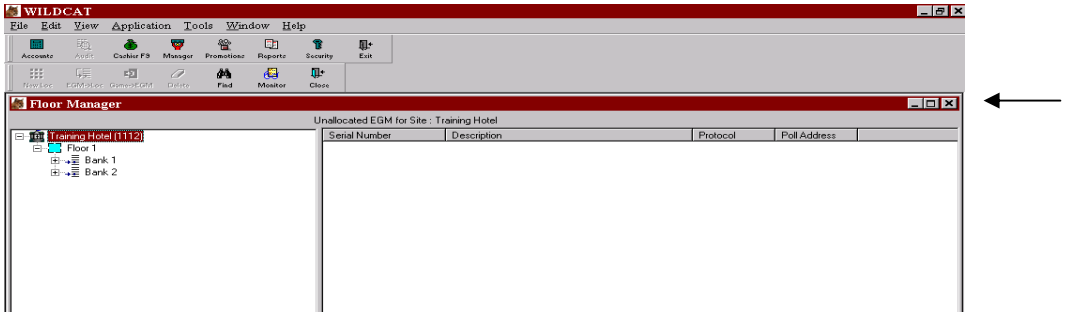
All machine faults and issues are to be logged with the Bytecraft Help Desk:

Bytecraft Help Desk
1800 021 814

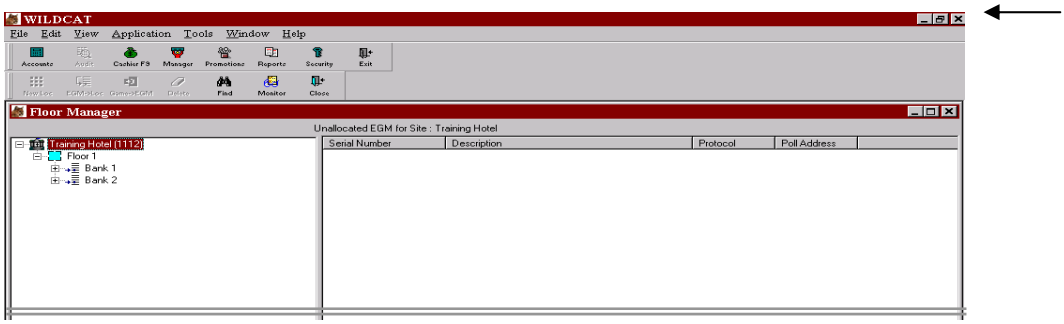
2 Basic User Tips

The wildcat system will always default to 'ALL' unless otherwise specified. To move around the dialogue boxes use the mouse and cursor.

Clicking on the X box on the top right hand corner of the window will close that window.



Clicking on the X in the top right hand corner of the screen will exit the Wildcat Program.



2.1 Wizards

When requesting a particular report or completing data entry Wildcat will ask for information using a 'wizard' function. When completing a wizard:

- Read each screen carefully;
- To go back to the previous dialogue box, single click on the **BACK** button;
- To go to the next dialog box, single click on the **NEXT** button;
- To complete the process, single click on the **FINISH** button;
- To abort the wizard, single click on the **CANCEL** button.

2.1.1 Run Wizard Again on Finishing

There is a 'RUN WIZARD AGAIN' feature in this program. This is a time saving device when inputting information repeatedly. If the RUN WIZARD AGAIN box is ticked, the wizard will reappear each time you click the FINISH button. To turn it off, single click on the Run Wizard Again box; the tick will disappear.

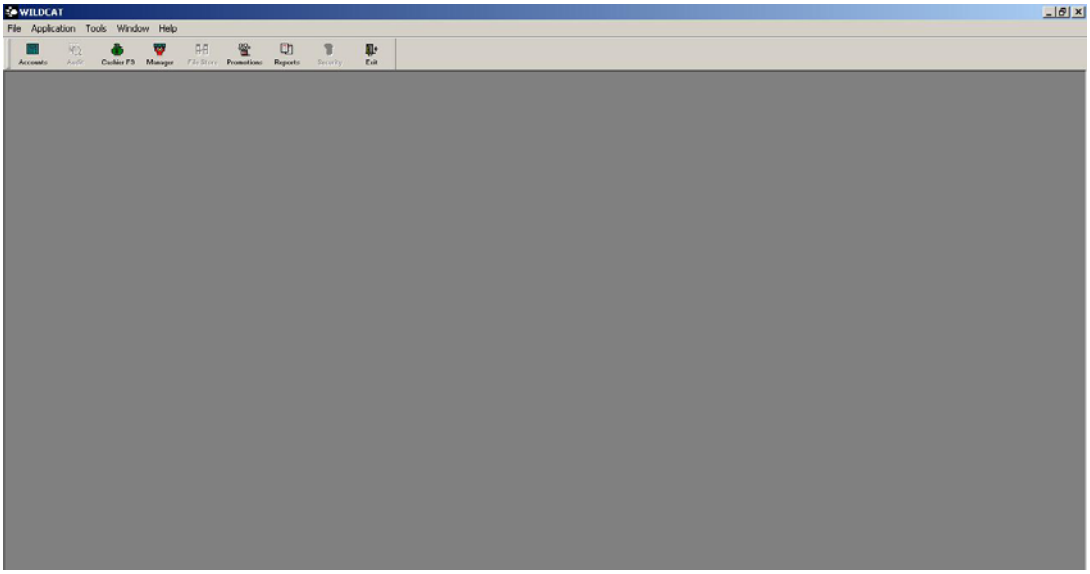
3 Opening Wildcat

To gain access to the program you must have a User ID and Password (to create a password and user i.d please refer to the Wildcat 6.3.02 Manual for the chapter on SECURITY or call the Wildcat Help Desk 1800 700 116).

On your computer screen (desktop) there will be a Wildcat icon (the pawprint). Double click on the Wildcat icon.

The Logon screen will appear:

1. Enter your User ID in the field indicated.
2. Press TAB or use the mouse to click at PASSWORD.
3. Enter your Password (password is NOT case sensitive).
4. Single click on OK or press Enter.
5. The Wildcat Program has now been accessed (as shown below).



To close the Wildcat program, single click on the EXIT icon at the top right of the application toolbar or single click the X in the top right hand corner of the screen.

4 Accessing Card Accounts

Click on the Promotions icon in the WILDCAT main toolbar to bring up the Promotions Map.

Click on the CARD ACCOUNTS icon.

The Patron Maintenance Screen will display.

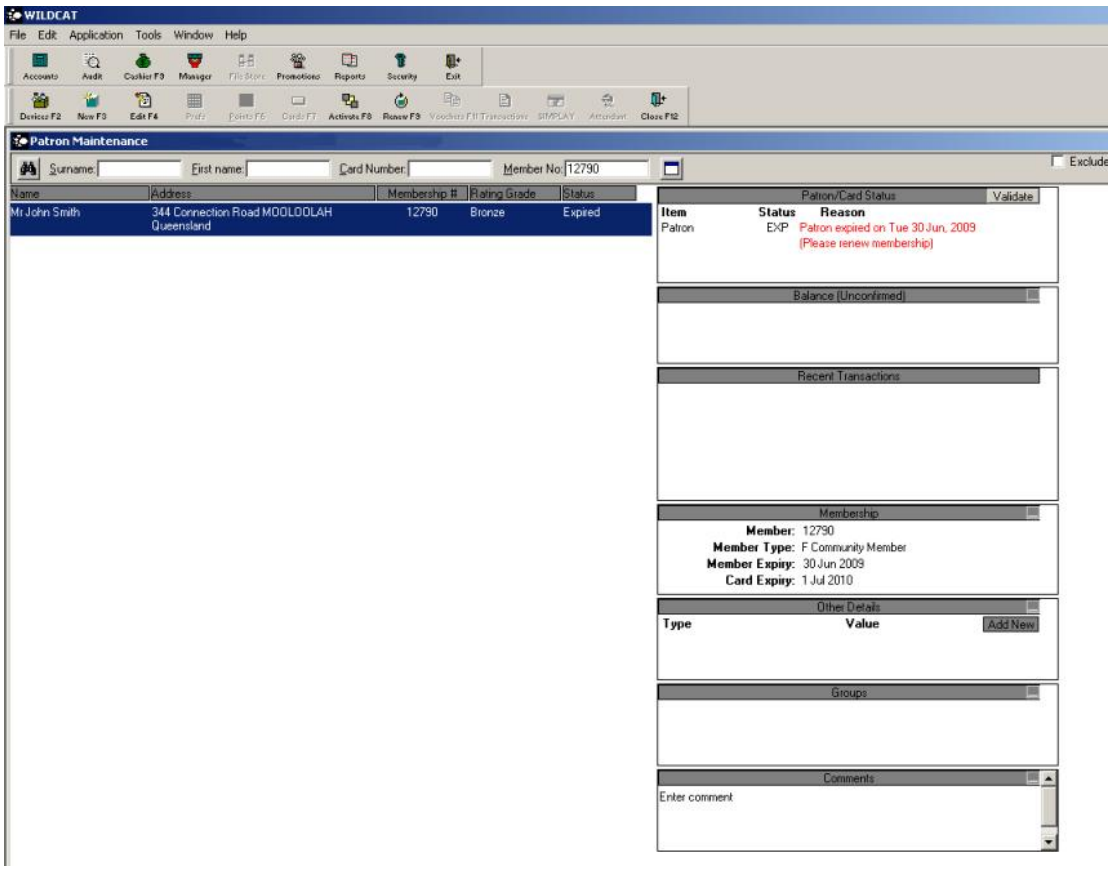
4.1 Patron Status

The patron search wizard has the facility to display patrons depending on their status. At the far right of the screen are four boxes. Tick the box that applies to the criteria needed.

ACTIVE	Member is active in database (also known as FINANCIAL)
EXPIRED/DEC	Member is NOT active in database (aslo known as UNFINANCIAL) or has been marked as DECEASED.
SUSPENDED	The Member has been suspended in the database (due to incorrect details/bad behaviour/self-exclusion etc). A suspended member CAN be activated.
CANCELLED	Member has been Cancelled.
EXCLUDED	Patron has been excluded (see Wildcat Player Exclusion documentation)

4.2 Patron Maintenance Screen

When a member is found to match the criteria typed in the search fields, their details will appear as below.



When multiple members are found matching the criteria in the search fields, select the member required by clicking once with the mouse or by using the up and down arrows on the keyboard. The selected member will be highlighted in blue.

The highlighted member's details will show at right – listing points balance, recent transactions, Membership Database Fields, other details (if any), whether they are members of any membership groups and any comments entered regarding the patron.

When you have entirely finished with the Patron Maintenance screen, click on the CLOSE button, press F12 to close this window and return to the Promotions Map screen.

4.2.1 Comments Field

At the bottom right of the patron's details is a comments box. This is a free text section where staff can type in any comments regarding the patron. These comments can only be viewed by looking up the member's details on a computer with Wildcat installed or by viewing the Patron Comment Report.

4.3 Setting up a Card Swipe or Card Printer

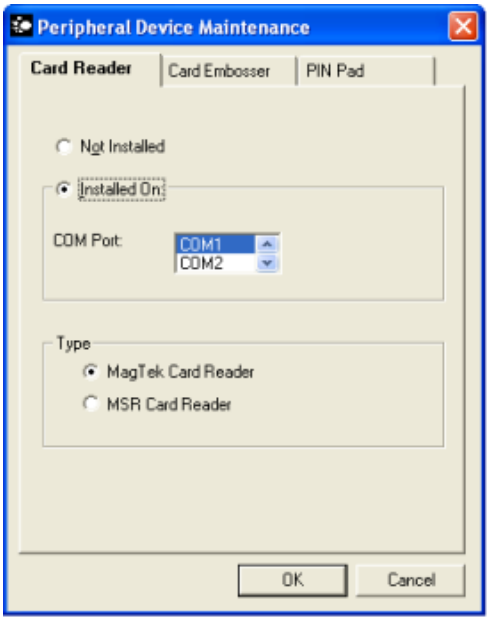
At the top left of the patron maintenance screen there is a DEVICES icon. Devices is used to set up the card swipe or printer so that Wildcat can recognise that it has been installed. This is only required if there is a card swipe or printer to be attached to the Management PC.

A card swipe allows the user to find membership details fast by swiping the member's card through the attached card swipe.

A card printer allows the user to print the members details directly onto the card .

4.3.1 Installing a Card Swipe

Click on the DEVICES icon (or press F2) to bring up the following dialogue screen. The first tab will be for the card swipe (Card Reader).



Complete the fields for this window.

Card Reader Not Installed	Select this if there is no card reader installed
Card Reader Installed On	Select this button if there is a card reader installed
Com Port	Select the Com Port to which the card reader is attached.
Type	The default should be MagTek Card Reader.

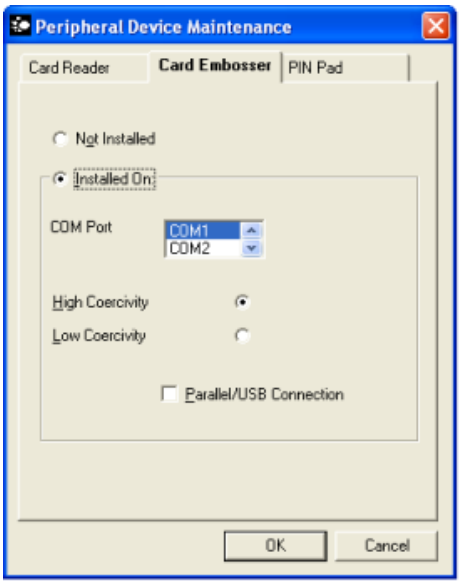
Click OK.

If you have selected the correct COM Port the light on the card swipe will be yellow. If the light does not turn on and an error message CARD READER NOT RESPONDING or CARD READER NOT INSTALLED shows at the bottom of the screen return to the DEVICES screen and choose another COMPort (it may take a few tries to get the correct comport).

If the Card Swipe does not light up for any of the comports, the port may be broken or disabled. If the computer is owned by Maxgaming, please contact the Wildcat Help Desk. If the computer is owned by the site please contact your I.T technician.

4.3.2 Installing a Card Printer (Embosser)

Click on the DEVICES icon (or press F2) to bring up the following dialogue screen.



The first tab will be for the card swipe (Card Reader). Click on the CARD EMBOSSER TAB to bring the tab forward.

Complete the fields for this window

Not Installed	Select this button if no card embosser is installed
Installed On	Select this button if a card embosser is installed.
Com Port	Select the Com Port to which the card embosser is attached if the embosser is connected using a 9 pin Comm cable.
High/Low Coercivity	Select the type of magnetic strip type for your cards. It may indicate HI-CO or LO-CO on the back of the cards or Maxgaming can usually advise on the type of card being used.
Parallel/USB Connection	Tick this box if the card printer is connected via a USB connection.

Please note that the printer is to be connected via a COMMS or USB cable. It cannot be both nor can it be connected via a LPT 20 Pin Printer Cable. For more information please contact the supplier of your printer. Click OK to save the details.

4.3.3 Troubleshooting a Card Embosser

The cards and the card embosser should be kept and used in a dust free environment. The print head and encoding head must be cleaned regularly. Refer to the embosser manual for cleaning procedures.

If you have trouble printing or encoding cards, please refer to the embosser user manual. There is an Appendix in the manual that contains a troubleshooting guide. A summary of possible printer problems is given in the table below.

Symptom / Problem	Reason / Solution
The printer appears to be working, but nothing is printing.	Verify that the ribbon is loaded and is the correct way round, and is unbroken.
Printing is faded or patchy.	Check ribbon. Clean the Print Head.

Symptom / Problem	Reason / Solution
Embosser does not read card, claiming it may be inserted incorrectly.	If the card is inserted correctly and is known to be readable, it may be that the magnetic Read/Write Head needs cleaning. Refer to the embosser's manual for the cleaning procedure.
Printing stops and the STATUS B indicator light is ON	Printer Command Coding Error. Clear command error by pressing the Panel Button on embosser. This should eject any cards in embosser. Try again with a new card.
Printing stops and the STATUS B indicator light is blinking	Ribbon or Card Out/Error. Check for sufficient cards in tray. Check for broken ribbon.
Printing stops and the STATUS B and STATUS C indicator lights are ON	Card Jam Press Panel Button to clear cards. If this fails, refer to manual for clearing media jam.

5 Membership

The following information is regarding the membership database portion of the Wildcat Card Services System.

5.1 Finding an Existing Member

If you wish to create a new patron, or set up a card reader or embosser, you do not need to select an existing patron name from the list.

To find an existing member's details you can one of the following:

1. Type all or part of their surname into the SURNAME field and press ENTER;
2. Type all or part of their first name into the FIRST NAME field and press ENTER;
3. swipe their card through the card reader (if there is a reader attached); or
4. Type the patron's membership number (from the patron's card) into the Member No. field and press ENTER.

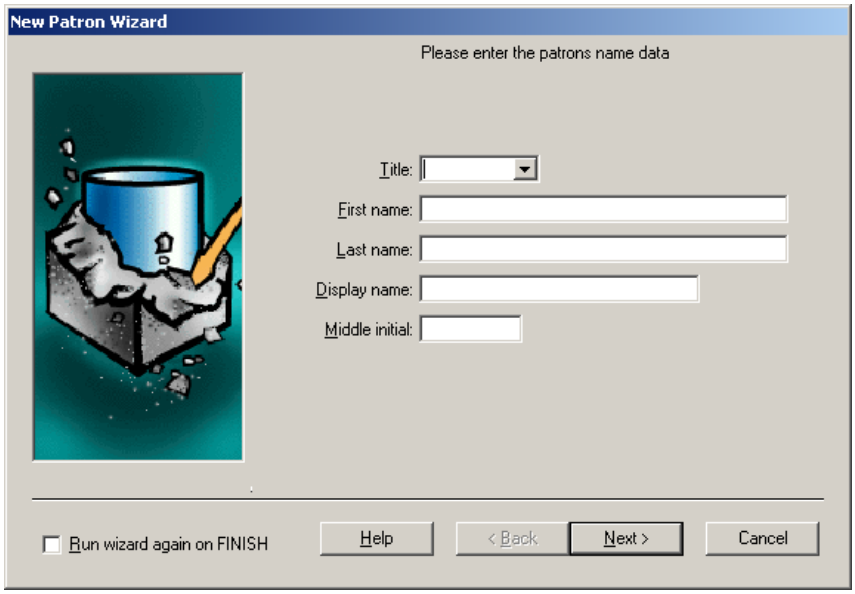
5.1.1 Clear Search Screen Option

At the top right of the search screen there is a small white box. Clicking this box will clear the search screen to enable you to search for other patrons using different criteria.

If unsure of the button to press, you can rest your mouse pointer on the box and CLEAR SEARCH SCREEN will appear.

5.2 Adding a New Member

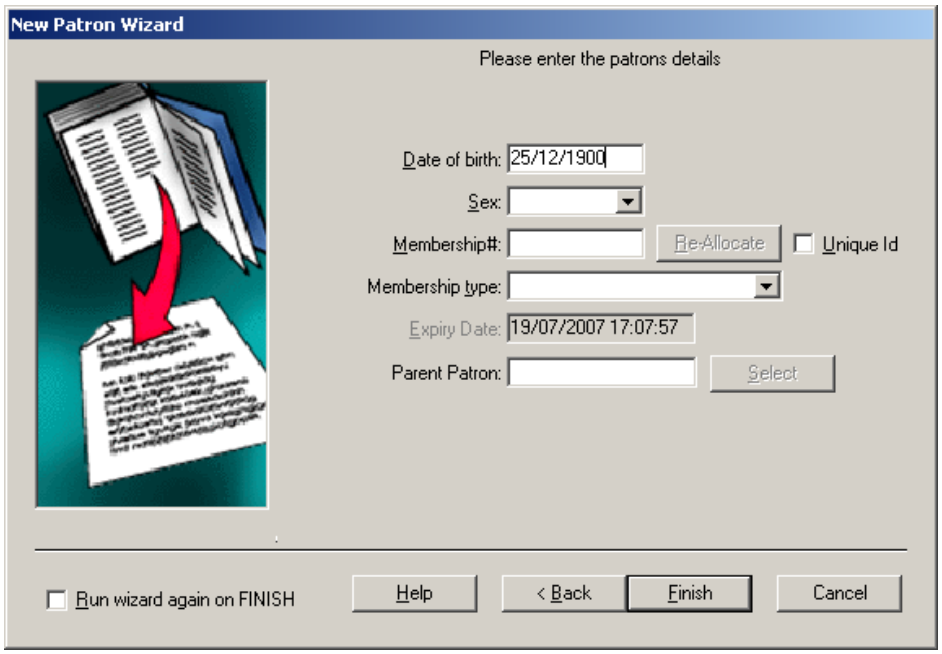
At the top of the screen click on NEW or press F3.



Complete each field as per the patron's application form. Click NEXT to move through each screen. Click BACK to return to the previous screen.

At the final screen, depending on the setup of your program the membership # field may already be completed (this is the 'Membership # lookup' option – where Wildcat identifies any membership numbers that aren't attached to actual members).

If the Membership # field is blank, type in the next available member number according to your records.



If available choose a Membership Type from the drop down list. Click FINISH.

The member will now appear in the Patron Maintenance Screen. To print a card, refer to CREATING A NEW CARD on Page 15.

5.3 Editing Existing Patron Details

The Edit Patron button is used to edit the details of an existing patron.

Open the Patron Maintenance window.

Find the patron's details by doing one of the following:

1. Type all or part of their surname into the SURNAME field and press ENTER;
2. Type all or part of their first name into the FIRST NAME field and press ENTER;
3. swipe their card through the card reader (if there is a reader attached); or
4. Type the patron's membership number (from the patron's card) into the Member No. field and press ENTER.

Select the patron from the list clicking once with the mouse.

To open their details and enable changes you can do one of the following:

- click on the Edit Patron icon at the top of the screen;
- press F4; or
- double click the patron's detail to open the details for editing.

Edit any data fields as required. Move along the Tabs (click on the Tabs to select) to edit further details.

Click the OK button to save the details.

The Patron Maintenance screen will show the edited details.

Click the Close button (or press F12 or Esc) to close the Patron Maintenance screen.

5.4 Cancelling a Patron

There is no function is Wildcat to allow you to cancel a patron. If you wish to have membership details cleared from the data base, suspend the patron (see Suspending a Patron below) and contact Maxgaming Help Desk to have them removed from the database.

5.5 Suspending a Patron

Select the patron in the Patron Maintenance window as per Finding an Existing Patron instructions.

Please Note: the patron status must be active for them to be suspended.

Click on the Suspension button (or press F8). At the prompt, enter reason for Patron Suspension.

The reason for the Suspension can be seen in the Promotions Audit Report found in Promotions Reports.

Click on the OK button to suspend the patron's account or click on the Cancel button to cancel the transaction.

The status of the patron is updated and displayed on the Patron Maintenance screen.

Click on the Close button or press F12 or Esc.

Please Note: A patron's active cards are also suspended when the patron is suspended. Please see ACTIVATING PATRON CARDS on page 21 for more information.

5.6 Activating a Patron

To reactivate a patron that was previously suspended select the patron in the Patron Maintenance window (the patron has to be suspended to be able to be re-activated).

Click on the Activate button (or press F8). Enter reason for Patron Activation in the pop-up window. The reason for the Suspension can be seen in the Promotions Audit Report found in Promotions Reports.

Click on the OK button window to activate the patron's account or click on the Cancel button to cancel the transaction.

The status of the patron is updated and displayed on the Patron Maintenance screen. All cards attached to this patrons were suspended when the patron was suspended. You will need to re-activate each of the patron's cards after re-activating the patron. Please see ACTIVATING PATRON CARDS on page 21 for more information.

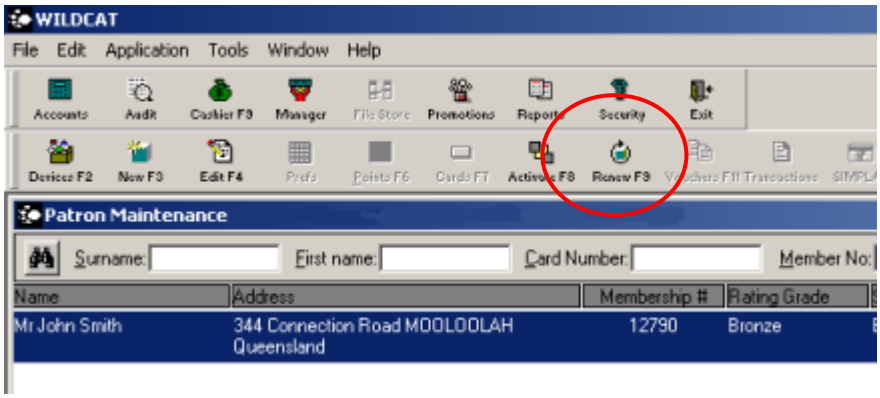
Click on the Close button or press F12.

5.7 Membership Receipting

**This function can only be used if the Membership Receipting function has been enabled at your venue.

When a person is unfinancial (expired) they will be able to renew their membership through the Wildcat program. This should eliminate the use of dual membership systems.

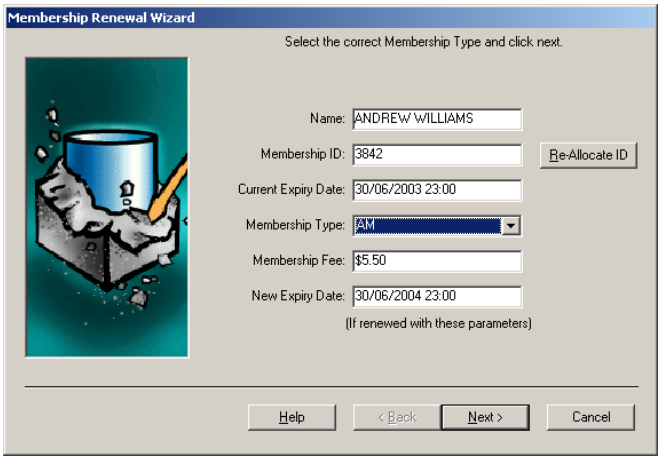
Find the member through the patron maintenance screen (type in the membership number, swipe the membership card or type in the surname). Once the record is found, the RENEW (F9) button should be enabled. If this doesn't enable, check the expiry date of the patron (at the right of the screen).

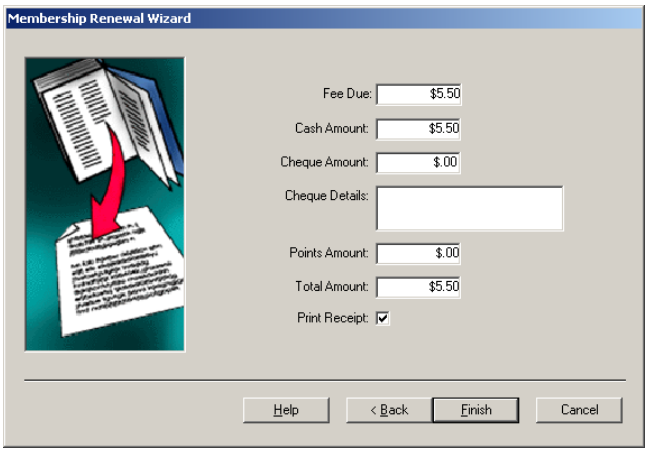


Clicking on this button will display the Membership Renewal Wizard.

The membership type details (including expiry date and membership fees) are set in the Membership Types found in Manager Utiltiies – please refer to the Manager Utilities manual for more information.

In this screen, check that all details are correct (change the Membership Type if required) and click on NEXT to move to another screen of the wizard.





Enter the type of payment and amount and click on FINISH.

If PRINT RECEIPT is ticked, a receipt will automatically print when FINISH is pressed.

Completing this transaction will renew the member. If a new card is required follow normal procedures for new cards.

6 Maintaining Patron Cards

Patron's cards can be maintained via the Player Card Maintenance screen. You can create a new card, print a member's name on the card (if you have a Card Printer attached to your Management PC) or you can put in a request to have a new patron card created. You can also suspend or cancel active cards, and activate suspended cards.

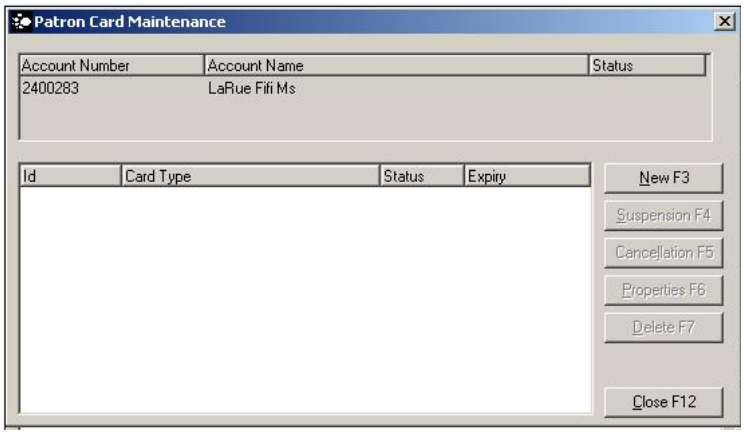
6.1 Creating a New Card (Card Printers)

The following is information for venues who have purchased a card printer. For the setup of the card printer please refer to the section Installing A Card Printer on page 8.

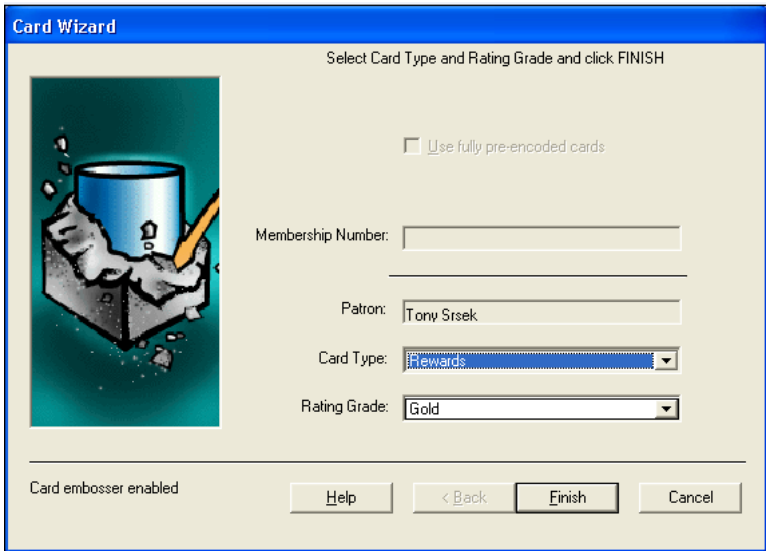
To create a new card, select a patron on the Patron Maintenance screen.

Find the patron as per normal search processes. Click on the Cards button or press F7.

Click on New or press F3.



The New Card Wizard will appear with the patron's details.



Click FINISH. The embosser will be initialised, and you will be prompted to place a blank card in the embosser.

Insert a card into the embosser with the magnetic strip facing downwards. If the card is inserted the wrong way round, or is damaged or dirty, you will be prompted to re-insert it.

Click OK. A card will be encoded with the patron's account number and their detailsand printed on the fact of the card. It will drop into the hopper at the back of the embosser.

You will be prompted to confirm that the card was embossed correctly. Click the YES button to confirm, or NO to repeat the embossing procedure.

If you select YES, the card details are added to the database and the details are displayed in the Card Maintenance window. The card WILL NOT work until you click YES.

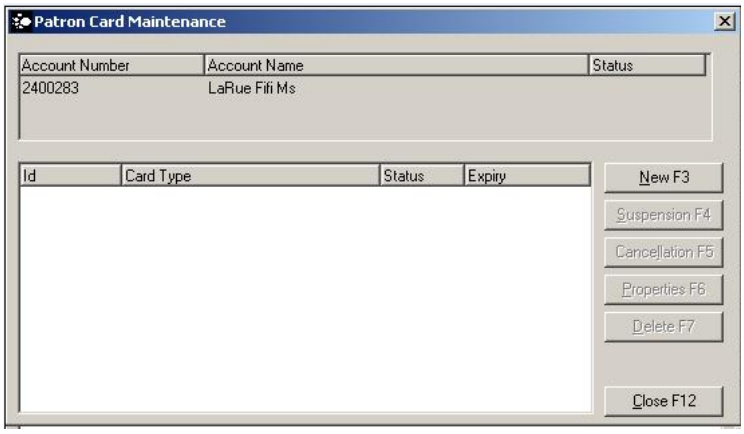
6.2 Creating a New Card Using the Card Swipe (Pre-Encoded Cards)

The following information is for venues who DO NOT have a card printer but have PRE-ENCODED Cards.

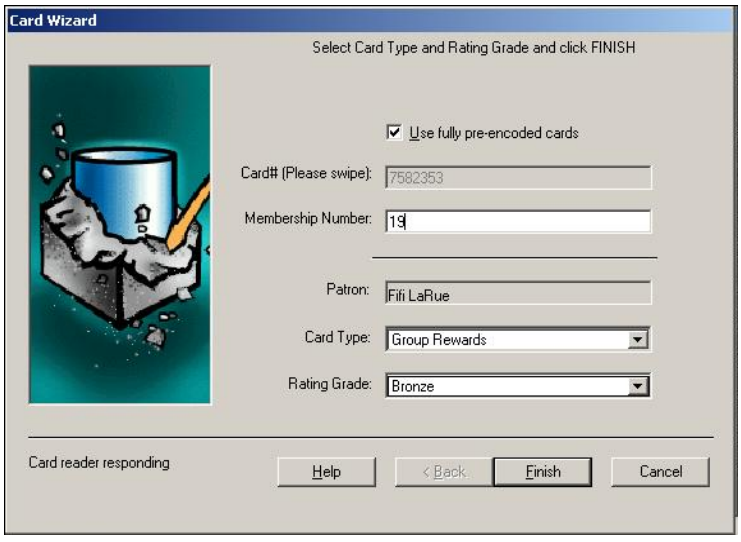
To create a new card, select a patron on the Patron Maintenance screen.

Find the patron as per normal search processes. Click on the Cards button or press F7.

Click on New or press F3.



The New Card Wizard will appear with the patron's details. Ensure a tick is placed in the USE FULLY PRE-ENCODED CARDS box.



Swipe the next available card through the card swipe attached to the computer. This will read the encoded number on the black strip of the card. Type in the membership number that is printed on the front of the card.

Click FINISH.

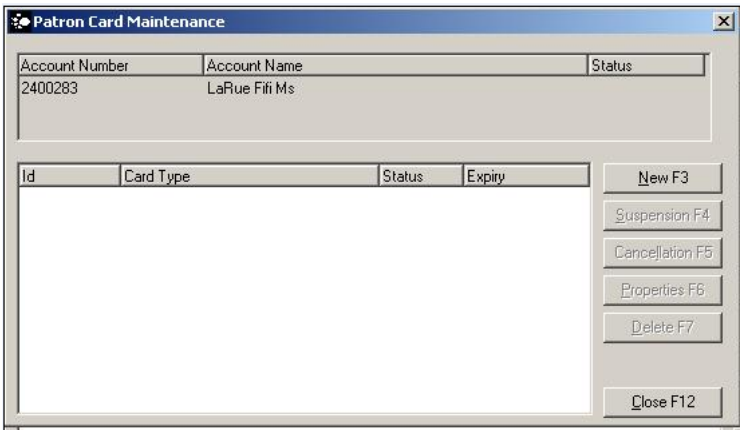
6.3 Creating a New Card (Requesting a Card Print)

The following information is for venues that DO NOT have a card printer or pre-encoded cards. The cards are stored at Maxgaming Head Office and are printed when required.

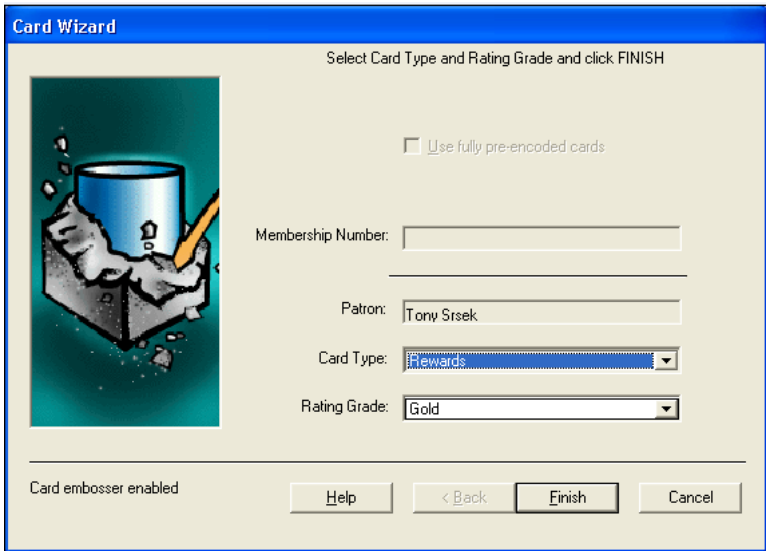
This process will request a card to be printed from Maxgaming Head office and then sent to the site directly. Please talk to your Maxgaming Account Manager about the availability of this option.

Find the patron as per normal search processes. Click on the Cards button or press F7.

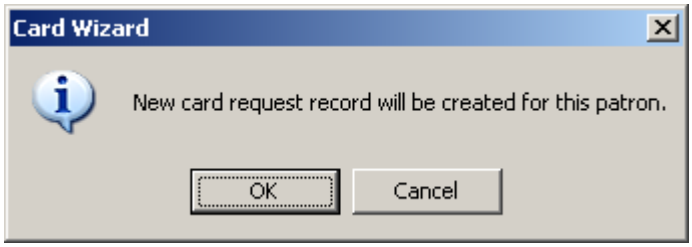
Click on New or press F3.



The New Card Wizard will appear with the patron's details.



Click FINISH. As no embosser is attached the system will save a card record to be printed later.



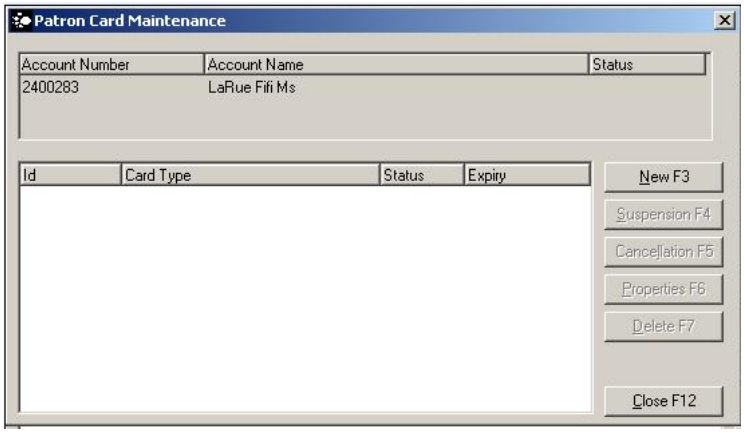
Maxgaming will produce the cards at intervals during the working week and send the cards directly to your venue.

6.4 Creating a New Card (Batch Print)

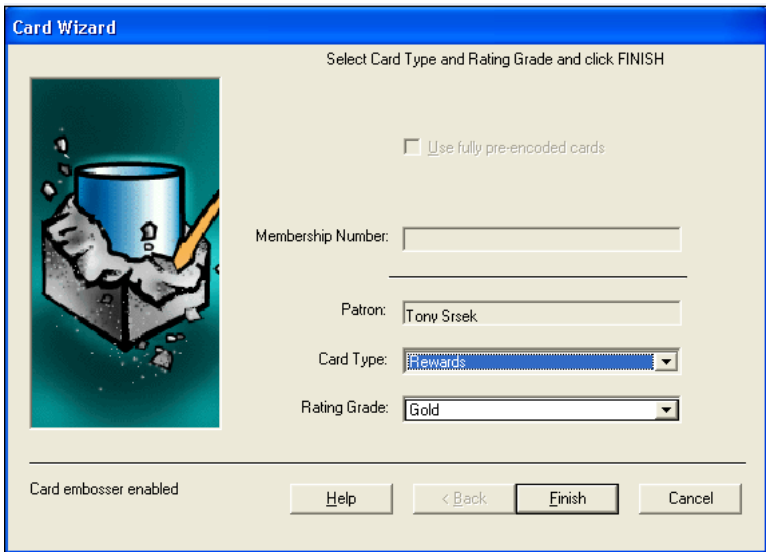
This function is used to create a large batch of cards in one attempt. It is useful when renewing or adding in a large 'batch' of new members. A card printer cannot be connected to the computer at this time, otherwise the cards will print (turn the card printer off).

Add the membership details as per the normal NEW PATRON process. Click on the CARDS button or press F7.

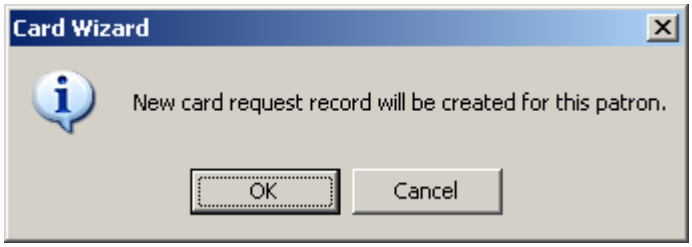
Click on New or press F3.



The New Card Wizard will appear with the patron's details.



Click FINISH. As no printer is attached the system will save a card record to be printed later.

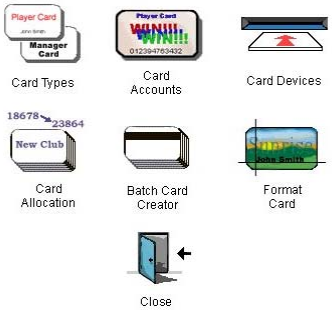


Once all members have been created and card records have been completed close the Patron Maintenance Screen to return to the PROMOTIONS map (as below).

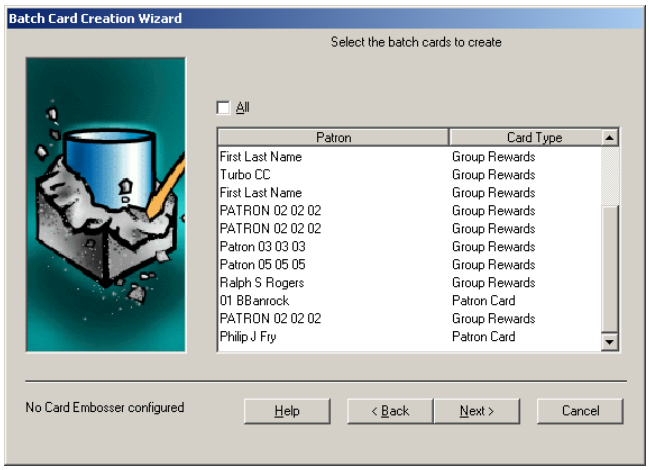
Click on MANAGER UTILITIES.

At the Manager Utilities Map, click CARDS (at the top left corner of the screen).

At the Cards Map, click on BATCH CARD CREATOR.



Click NEXT to view the cards to be printed:


Batch Card Creation Wizard
Select the batch cards to create
All
Patron
Card Type
First Last Name Group Rewards
Turbo CC Group Rewards
First Last Name Group Rewards
PATRON 02 02 02 Group Rewards
PATRON 02 02 02 Group Rewards
Patron 03 03 03 Group Rewards
Patron 05 05 05 Group Rewards
Ralph S Rogers Group Rewards
01 BBanrock Patron Card
PATRON 02 02 02 Group Rewards
Philip J Fry Patron Card
No Card Embosser configured
Help
< Back
Next >
Cancel

Click NEXT.

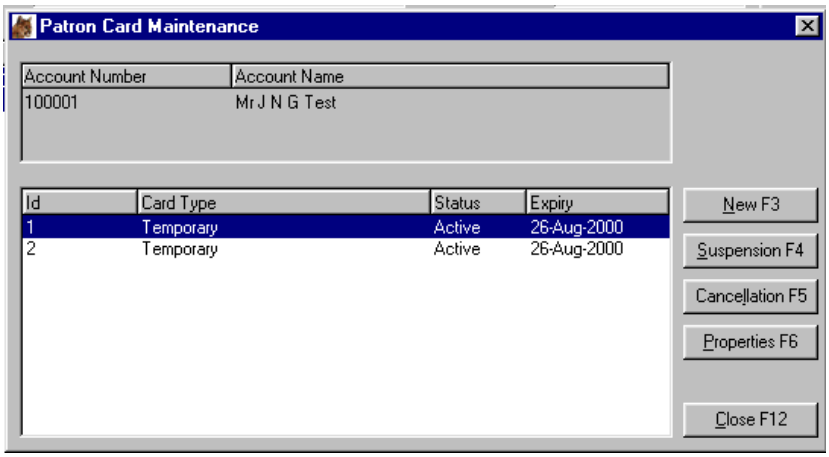
If a card printer is connected to this computer the default setting will be EMBOSS CARDS. Click FINISH and the printer will begin to print this batch of cards. It is possible for incorrectly encoded cards to be rejected during this process – please monitor the card print process for this reason.

Once all cards are printed, click OK.

6.5 Suspending a Card

Suspending a Patron's card stops the card working in any card reader units and kiosks. It may be necessary to suspend a card if they have lost the previous card or if the patron has had card priveleges revoked due to behaviour or attitude within the venue.

To suspend an active card find and select the patron on the Patron Maintenance screen, then click on the Cards button or press F7.



Select the active card from the list.

Depending on the current status of the card you select, the buttons to the right of the dialog box will differ (e.g. a currently active card cannot be activated, so there is a Suspension button instead).

Click on the Suspension button or press F4.

Enter a reason for Card Suspension in the pop-up window. The reason for the Suspension can be seen in the Promotions Audit Report found in Promotions Reports.

Click on the OK button to suspend the card or click on the Cancel button to cancel this process.

The status of the card is updated and displayed on the Player Card Maintenance screen.

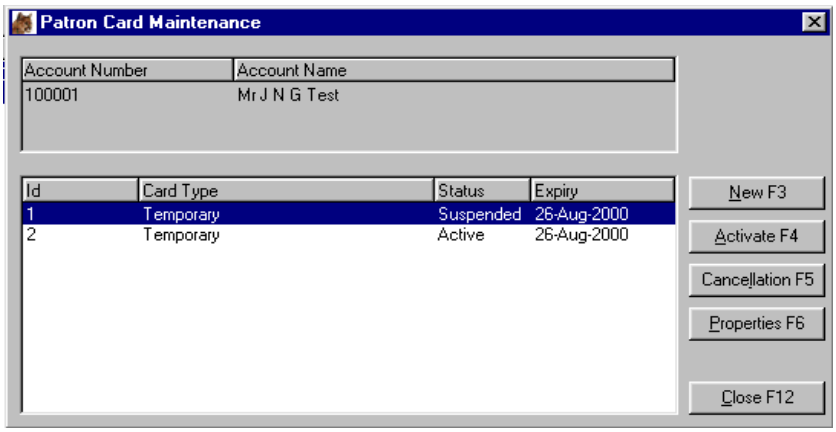
Click on the CLOSE button or press F12 or Esc.

The card will no longer be validated if it is inserted into a card reader on an EGM or in the Kiosk and will therefore not accumulate points.

6.6 Activating a Suspended Card

Acitivating a Suspended card will enable the card to be used in the card reader units and the Kiosk. The patron will now be able to earn loyalty points using the activated card.

To activate a suspended card select the patron on the Patron Maintenance screen, then click on the Cards button or press F7.



Select a card from the list (depending on the current status of the card you select, the buttons to the right of the dialog box will differ, e.g. a currently suspended card cannot be suspended, so there is an Activate button instead).

Click on the Activate button or press F4. Enter a reason for Card Activation in the pop-up window. The reason for the Suspension can be seen in the Promotions Audit Report found in Promotions Reports.

Click on the OK button to activate the card or click on the Cancel button to cancel this process.

The status of the card is updated and displayed on the Player Card Maintenance screen.

Click on the Close button or press F12 or Esc.

6.7 Cancelling a Card

Please Note: A cancelled card CANNOT BE RE-ACTIVATED.

To cancel a card find and select the patron on the Patron Maintenance screen, then click on the Cards button or press F7.

Select the card to be cancelled from the list. Click on the Cancellation button or press F5.

Enter a reason for Card Cancellation in the pop-up Window. Click on the OK button to cancel the Card or click on the Cancel button to leave the Card as it is.

The status of the card is updated and displayed on the Player Card Maintenance screen.

Click on the Close button or press F12 or Esc.

7 Patron Preferences

A feature of the Card Services System is the facility to record any patron's preferences, such as their favourite drink, food, sport, music etc. This information can assist your site in catering to the needs of your members and assist in marketing to specific customer bases.

The list of preferences from which the patron chooses must be set up prior to accessing this section. (Setting up default preferences is done in Manager Utilities/Patron Preferences. See the Manager Utilities manual for instructions.)

The Patron Preferences section is used for selecting the preferences a patron has and can be viewed and edited at any time.

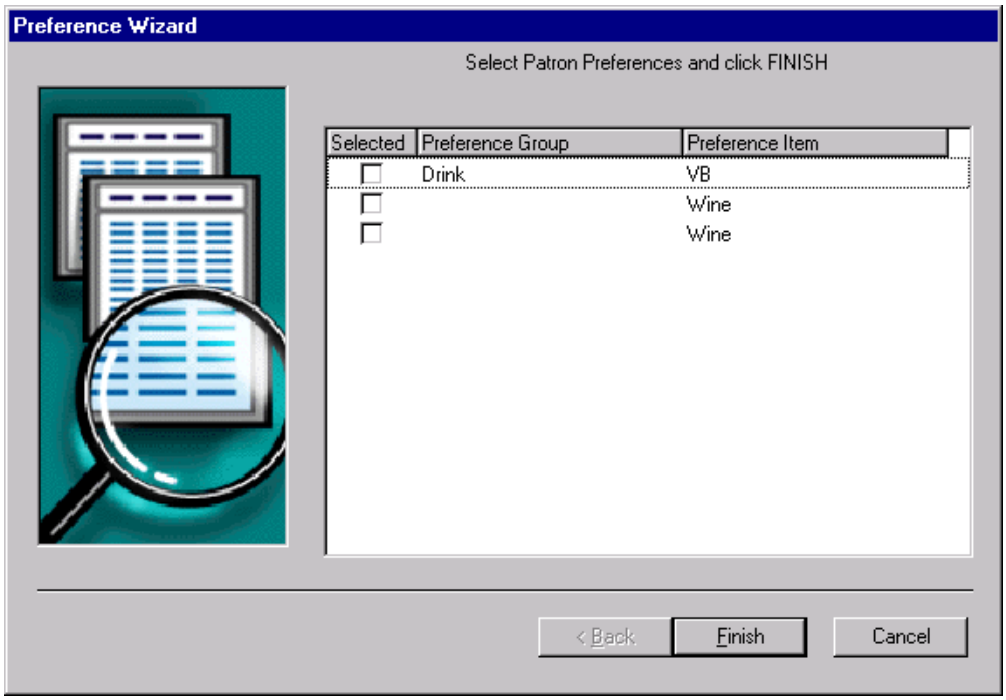
7.1 Selecting Patron Preferences

To assign Patron Preference, open the Patron Maintenance window and find an existing patron using one of the following steps:

1. Type all or part of their surname into the SURNAME field and press ENTER;
2. Type all or part of their first name into the FIRST NAME field and press ENTER;
3. swipe their card through the card reader (if there is a reader attached); or
4. Type the patron's membership number (from the patron's card) into the Member No. field and press ENTER.

Select the patron from the list. Click on the Preferences button (or press F5).

The patron preference window will appear.



Place a tick in the required check boxes to reflect the patron's preferences.

Click the Finish button when done.

8 Points

The points a patron accumulates can be classified under various categories. For example: Bonus Points, Rating Points, Complimentary Points, etc. The amount of points a patron accumulates is dependent on how the points were set up initially. For an explanation of the points set up, see the Points section in Manager Utilities Manual.

The different types of points can be redeemed for money, beverages or for other items available in the category that the points were accumulated in. The point total given to a patron can also be manually adjusted in the case of error or for winning a promotion, and points can be transferred to another card.

Please note: Point activities are only possible on an active player card.

The types of points, referred to as Tracking Types, are as follows:

Bonus Points	Usually redeemed for money, beverages or other items. These points can be shown on the card reader display for the Patron's information.
Rating Points	Used for calculating a patron's rating, to assist when sorting reports. For instance a regular patron may earn a higher rating and be rewarded because of the higher rating.
Complimentary Points	Similar to Bonus but usually redeemed by site management when giving away complimentary items such as dinners etc. Complimentary points are not visible to patrons.

8.1 Points Transactions

In general, when points transactions are carried out, some may take a minimal time to complete.

Whilst processing, a pop-up similar to the following will appear:

This pop-up should disappear within a few seconds when the transaction completes. You can cancel the transaction by clicking on the CANCEL button.

If for some reason the Card Services system is not responding, this pop-up will remain on screen.

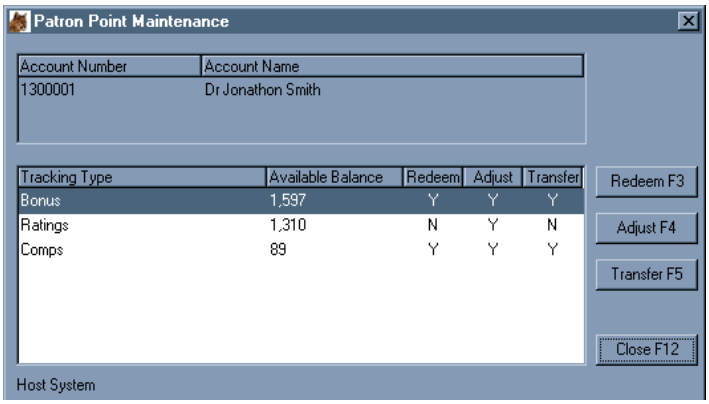
Click on the CANCEL button to terminate the transaction. The transaction will be cancelled, and the database will not be updated. If this problem persists, contact the maxgaming Helpdesk on 1800 700 116.

8.2 Redeeming Points

To redeem points that a patron has accumulated open the Patron Maintenance window. Find the patrons as per normal search processes. If a list of patron's matching the search criteria appear, select the correct patron from the list.

Click on the Points button (or press F6).

In the Player Point Maintenance window, select the type of points to redeem (normally bonus points).



Click on the Redeem button (or press F3).

If redemption is not allowed, the Redeem button will be grayed out. If there is no balance, only Adjust will be available.

Select an item from the list of available items shown in the next screen (these will have been entered via Manager Utilities/Redemption Items).

Select the number of items from the Quantity to redeem box. Click Next.

If there are not enough points available for the redemption, you will get an error message displaying the shortfall (in RED). If this is the case, click on the Back button to change the item or the number of items if more than one or click Cancel to cancel the redemption.

If the redemption is valid, you can print the voucher the patron will need to redeem the item. Type or edit comments in the Comments fields if relevant to redeeming that item (you can save these comments for future items by clicking on the Save Comments button).

Click the Finish button and once the transaction has processed click Yes in the confirmation pop-up.

The item's value in points will be deducted from the patron's available points and a voucher is printed for the patron on the selected printer. The patron can present this voucher in order to claim the item. Their balance is updated and you are returned to the Patron Maintenance window.

Click on the Close button or press F12 or Esc to exit.

8.3 Adjusting Points

Please note that permission to adjust points is set in the Security section of Wildcat. If the user logged onto Wildcat doesn't have access to adjust points, the ADJUST option will be greyed out. A different user with Adjust priviledges will need to log onto Wildcat.

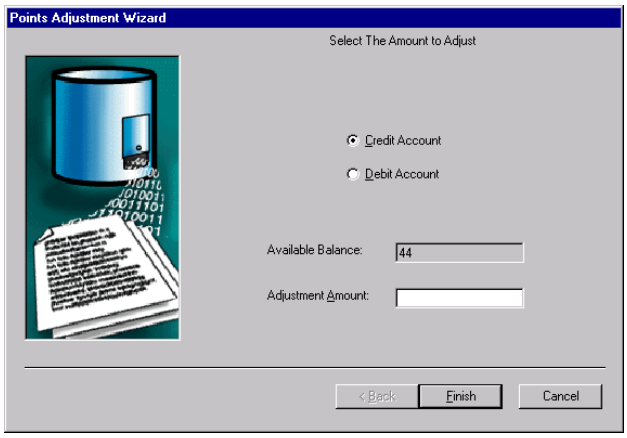
To adjust points that a patron has accumulated open the Patron Maintenance window.

To adjust points that a patron has accumulated open the Patron Maintenance window. Find the patrons as per normal search processes. If a list of patron's matching the search criteria appear, select the correct patron from the list.

Click on the Points button (or press F6).

In the Player Point Maintenance window, select the type of points to adjust (the Tracking Type).

Click on the Adjust button (or press F4). (If adjustments are not allowed, the Adjust button will be grayed out).



Click on the Credit Account or Debit Account button as required.

In the Adjustment Amount field, type the amount that you want to adjust the point balance by.

Click the Finish button. Once the transaction has completed click Yes in the confirmation pop-up.

The patron's points will be adjusted in the database and you are returned to the Patron Maintenance window. Click on the Close button to exit the screen.

8.4 Transferring Points

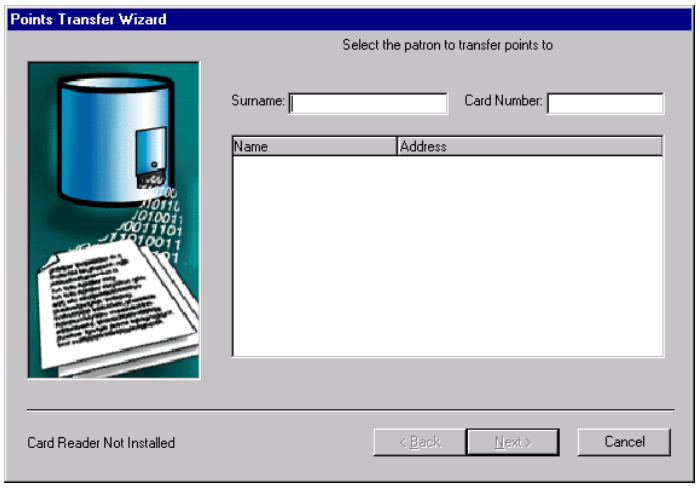
Please note that permission to transfer points is set in the Security section of wildcat. If the user logged onto wildcat doesn't have access to transfer points, the TRANSFER option will be greyed out. A different user with Transfer priviledges will need to log onto Wildcat.

Bonus Points can be transferred from one patron's account to another's. The transferring and receiving accounts must both be active.

To transfer points that a patron has accumulated open the Patron Maintenance window. Find the patrons as per normal search processes. If a list of patron's matching the search criteria appear, select the correct patron from the list.

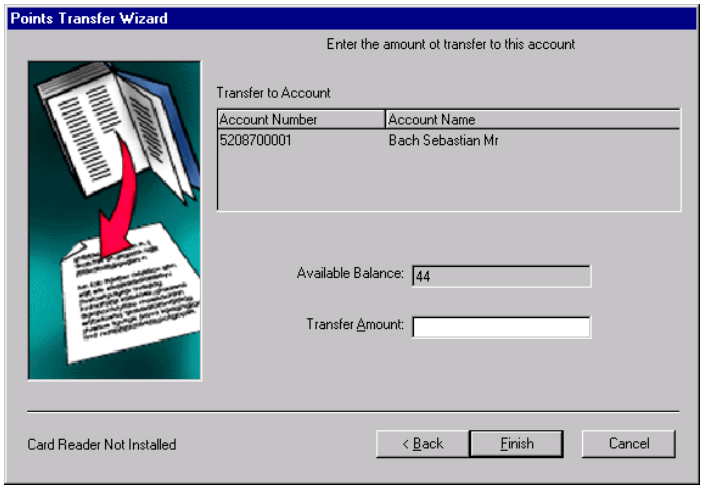
Click on the Points button (or press F6). Click on the Transfer button (or press F5). (If transfers are not allowed, the Transfer button will be grayed out).

The points transfer wizard will ask for the patron name who will be receiving the transferred points.



Enter the name of the patron you want to transfer the points to by swiping the patron's card through the card reader (if enabled) or type the patron's surname in the surname field. Select the patron from the list.

Click on the Next button.



Type the amount of points that you wish to transfer into the Transfer Amount field and press ENTER or click on the FINISH button.

Click YES in the confirmation pop-up.

The patron's points will be adjusted in the database and you are returned to the Patron Maintenance window.

Click on the Close button or press F12 or Esc to exit.